

iPOS End User for SunSystems

Duration: 1 Day

Prerequisite: An understanding of the purchasing process. Knowledge of Microsoft's Windows Internet Explorer.

Who Should Attend: Users who will be using iPOS in their purchasing process.

What You Will Learn: At the completion of this training session participants will be competent in:

- Creating and modifying requisitions
- Submitting requisitions for approval
- Approving requisitions
- Returning and rejecting requisitions
- Generating purchase orders via Control Desk
- Modifying, viewing and searching for purchase orders
- Printing purchase orders
- Resending purchase orders
- Receipting of goods
- Modifying, adding and deleting lines on goods receipts
- Entering invoices
- Matching invoices to existing purchase orders
- Approving and rejecting invoices
- Modifying, adding and deleting lines on invoices
- Disputing lines items on invoices
- Matching disputed lines to credit notes

Please see over page for course content

Course Content – iPOS End User for SunSystems

Introduction and Overview

- iPOS browser

Requisition Entry

- Creating a requisition
- Creating a requisition for non-stocked items
- The advanced view of the requisition screen
- Recalling and modifying requisitions that have already been submitted for approval
- Submitting requisitions to an exception authority
- Searching for a requisition

Requisition Approval

- Approving a requisition
- Returning a requisition

Control Desk

- Generating a purchase order
- Viewing existing purchase orders
- Resending a purchase order
- Searching for purchase orders

Goods Receipting

- Searching for items available for goods receipting
- Receiving goods
- Receiving partial deliveries
- Audit trails

Invoice Entry

- Matching an invoice to an existing purchase order

- Entering additional costs
- Correcting invoice and purchase order differences
- Correcting Coding Errors
- Entering an invoice without an associated purchase order
- Matching multiple invoices to a single purchase order
- Disputing invoice lines
- Matching disputed lines to credit notes
- Matching a single invoice to multiple purchase orders

Invoice Approval

- Approving invoices
- Withholding invoices
- Returning invoices

Administrative Features

- Amending passwords
- Amending the default database/business unit
- Creating Favourites
- Re-assigning approval items
- Adding organisational specific help
- Viewing the To-Do List

Assets

- Creating a requisition for an asset

Multi Currency

- Creating a multi currency definition